

**Los Angeles County Office of Education  
Business Advisory Services**

**PUBLIC DISCLOSURE OF PROPOSED COLLECTIVE BARGAINING AGREEMENT  
in accordance with AB 1200 (Chapter 1213/Statutes 1991), AB 2756 (Chapter 52/Statutes 2004), GC 3547.5**

Name of School District:	Azusa Unified School District
Name of Bargaining Unit:	AFAE
Certificated, Classified, Other:	Certificated

The proposed agreement covers the period beginning: **July 1, 2023** and ending: **June 30, 2024**  
(date) (date)

The Governing Board will act upon this agreement on: **December 12, 2023**  
(date)

**Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action.**

**A. Proposed Change in Compensation**

Bargaining Unit Compensation  All Funds - Combined		Fiscal Impact of Proposed Agreement (Complete Years 2 and 3 for multiyear and overlapping agreements only)			
		Annual Cost Prior to Proposed Settlement	Year 1 Increase/(Decrease)	Year 2 Increase/(Decrease)	Year 3 Increase/(Decrease)
			2023-24	2024-25	2025-26
1. <b>Salary Schedule</b> Including Step and Column		\$ 983,813	\$ 52,142		\$ -
			5.30%	0.00%	0.00%
2. <b>Other Compensation</b> Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.		\$ -	\$ -	\$ -	\$ -
<b>Description of Other Compensation</b>					
3. <b>Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc.</b>		\$ 246,445	\$ 13,062		
			5.30%	0.00%	0.00%
4. <b>Health/Welfare Plans</b>		\$ 10,367	\$ 3,000		\$ -
			28.94%	0.00%	0.00%
5. <b>Total Bargaining Unit Compensation</b> Add Items 1 through 4 to equal 5		\$ 1,240,625	\$ 68,204	\$ -	\$ -
			5.50%	0.00%	0.00%
6. <b>Total Number of Bargaining Unit Employees (Use FTEs if appropriate)</b>		11.94			
7. <b>Total Compensation Average Cost per Bargaining Unit Employee</b>		\$ 103,905	\$ 5,712	\$ -	\$ -
			5.50%	0.00%	0.00%

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8. What was the negotiated percentage change? For example, if the change in "Year 1" was for less than a full year, what is the annualized percentage of that change for "Year 1"?

Each AFAE unit member will receive an on-schedule salary increase of 5.30%, and the district's contribution toward medical benefits will increase by \$1,500.00 retroactive to July 1, 2023, with no change in workdays or in class size.

9. Were any additional steps, columns, or ranges added to the salary schedules? (If yes, please explain.)

N/A

10. Please include comments and explanations as necessary. (If more room is necessary, please attach an additional sheet.)

N/A

11. Does this bargaining unit have a negotiated cap for Health and Welfare benefits?

Yes ☐

No ☒

If yes, please describe the cap amount.

N/A

- B. Proposed negotiated changes in noncompensation items** (i.e., class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.)

N/A

- C. What are the specific impacts (positive or negative) on instructional and support programs to accommodate the settlement?** Include the impact of changes such as staff reductions or increases, program reductions or increases, elimination or expansion of other services or programs (i.e., counselors, librarians, custodial staff, etc.)

N/A

**D. What contingency language is included in the proposed agreement (e.g., reopeners, etc.)?**

This agreement shall conclude compensation negotiations for the 2023-2024 school year.

**E. Identify other major provisions that do not directly affect the district's costs, such as binding arbitrations, grievance procedures, etc.**

N/A

**F. Source of Funding for Proposed Agreement:**

**1. Current Year**

Current year EFB.

**2. If this is a single year agreement, how will the ongoing cost of the proposed agreement be funded in subsequent years?**

Current year EFB and PY carryover.

**3. If this is a multiyear agreement, what is the source of funding, including assumptions used, to fund these obligations in subsequent years? (Remember to include compounding effects in meeting obligations.)**

Current year EFB and PY carryover.

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**G. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET****Fund 11 - Adult Education Fund**

Bargaining Unit:

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		Column 1	Column 2	Column 3	Column 4
		Latest Board- Approved Budget Before Settlement (As of June 20, 2023)	Adjustments as a Result of Settlement (compensation)	Other Revisions (agreement support and/or other unit agreement) Explain on Page 4i	Total Revised Budget (Columns 1+2+3)
Object Code					
<b>REVENUES</b>					
Federal Revenue	8100-8299	\$ 223,320		\$ -	\$ 223,320
Other State Revenue	8300-8599	\$ 1,695,059		\$ -	\$ 1,695,059
Other Local Revenue	8600-8799	\$ 219,002		\$ -	\$ 219,002
<b>TOTAL REVENUES</b>		\$ 2,137,381		\$ -	\$ 2,137,381
<b>EXPENDITURES</b>					
Certificated Salaries	1000-1999	\$ 744,922	\$ 52,142	\$ -	\$ 797,064
Classified Salaries	2000-2999	\$ 241,169		\$ -	\$ 241,169
Employee Benefits	3000-3999	\$ 385,790	\$ 16,062	\$ -	\$ 401,852
Books and Supplies	4000-4999	\$ 264,930		\$ -	\$ 264,930
Services and Other Operating Expenditures	5000-5999	\$ 209,022		\$ -	\$ 209,022
Capital Outlay	6000-6999	\$ 3		\$ -	\$ 3
Other Outgo (excluding Indirect Costs)	7100-7299 7400-7499			\$ -	\$ -
Transfers of Indirect Costs	7300-7399	\$ 72,639		\$ -	\$ 72,639
<b>TOTAL EXPENDITURES</b>		\$ 1,918,475	\$ 68,204	\$ -	\$ 1,986,679
<b>OTHER FINANCING SOURCES/USES</b>					
Transfers In and Other Sources	8900-8979	\$ -	\$ -	\$ -	\$ -
Transfers Out and Other Uses	7600-7699	\$ -	\$ -	\$ -	\$ -
<b>OPERATING SURPLUS (DEFICIT)*</b>		\$ 218,906	\$ (68,204)	\$ -	\$ 150,702
<b>BEGINNING FUND BALANCE</b>					
Audit Adjustments/Other Restatements	9791 9793/9795	\$ 800,183 \$ -			\$ 800,183 \$ -
<b>ENDING FUND BALANCE</b>		\$ 1,019,089	\$ (68,204)	\$ -	\$ 950,885
<b>COMPONENTS OF ENDING FUND BALANCE:</b>					
Nonspendable	9711-9719	\$ -	\$ -	\$ -	\$ -
Restricted	9740	\$ 398,527	\$ -	\$ -	\$ 398,527
Committed	9750-9760	\$ -	\$ -	\$ -	\$ -
Assigned	9780	\$ 620,562	\$ (68,204)	\$ -	\$ 552,358
Reserve for Economic Uncertainties	9789	\$ -	\$ -	\$ -	\$ -
Unassigned/Unappropriated Amount	9790	\$ (0)	\$ 0	\$ -	\$ 0

\*Net Increase (Decrease) in Fund Balance

**NOTE: 9790 amounts in Columns 1 and 4 must be positive**

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**Explanations for Column 3 "Other Revisions" entered on Pages 4a through 4h:**

Page 4a: Unrestricted General Fund	Amount	Explanation
Revenues	\$ -	
Expenditures	\$ -	
Other Financing Sources/Uses	\$ -	

Page 4b: Restricted General Fund	Amount	Explanation
Revenues	\$ -	
Expenditures	\$ -	
Other Financing Sources/Uses	\$ -	

Page 4d: Fund 11 - Adult Education Fund	Amount	Explanation
Revenues	\$ -	
Expenditures	\$ -	
Other Financing Sources/Uses	\$ -	

Page 4e: Fund 12 - Child Development Fund	Amount	Explanation
Revenues	\$ -	
Expenditures	\$ -	
Other Financing Sources/Uses	\$ -	

Page 4f: Fund 13/61 - Cafeteria Fund	Amount	Explanation
Revenues	\$ -	
Expenditures	\$ -	
Other Financing Sources/Uses	\$ -	

Page 4g: Other	Amount	Explanation
Revenues	\$ -	
Expenditures	\$ -	
Other Financing Sources/Uses	\$ -	

Page 4h: Other	Amount	Explanation
Revenues	\$ -	
Expenditures	\$ -	
Other Financing Sources/Uses	\$ -	

Additional Comments:

Azusa Unified School District  
AFAE**I. IMPACT OF PROPOSED AGREEMENT ON UNRESTRICTED RESERVES**

## 1. State Reserve Standard

		2023-24	2024-25	2025-26
a.	Total Expenditures, Transfers Out, and Uses (Including Cost of Proposed Agreement)	\$ 168,327,283	\$ 135,823,092	\$ 135,894,693
b.	Less: Special Education Pass-Through Funds	\$ -	\$ -	\$ -
c.	Net Expenditures, Transfers Out, and Uses	\$ 168,327,283	\$ 135,823,092	\$ 135,894,693
d.	State Standard Minimum Reserve Percentage for this District <b>Enter percentage</b> →	3.00%	3.00%	3.00%
e.	State Standard Minimum Reserve Amount for this District (For districts with less than 1,001 ADA, this is the greater of Line a, times Line b, or \$50,000)	\$ 5,049,818	\$ 4,074,693	\$ 4,076,841

## 2. Budgeted Unrestricted Reserve (After Impact of Proposed Agreement)

a.	General Fund Budgeted Unrestricted Designated for Economic Uncertainties (9789)	\$ 5,049,825	\$ 4,075,693	\$ 4,076,841
b.	General Fund Budgeted Unrestricted Unassigned/Unappropriated Amount (9790)	\$ -	\$ 0	\$ 0
c.	Special Reserve Fund (Fund 17) Budgeted Designated for Economic Uncertainties (9789)	\$ 3,647,667	\$ 3,667,667	\$ 3,667,667
d.	Special Reserve Fund (Fund 17) Budgeted Unassigned/Unappropriated Amount (9790)	\$ -	\$ -	\$ -
e.	Total Available Reserves	\$ 8,697,492	\$ 7,743,360	\$ 7,744,508
f.	Reserve for Economic Uncertainties Percentage	5.17%	5.70%	5.70%

## 3. Do unrestricted reserves meet the state minimum reserve amount?

2023-24

Yes

☒

No

☐

2024-25

Yes

☒

No

☐

2025-26

Yes

☒

No

☐

## 4. If no, how do you plan to restore your reserves?

N/A

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Total Compensation Increase/(Decrease) on Page 1, Section A, #5	\$ 68,204
General Fund balance Increase/(Decrease), Page 4c, Column 2	\$ -
Adult Education Fund balance Increase/(Decrease), Page 4d, Column 2	\$ (68,204)
Child Development Fund balance Increase/(Decrease), Page 4e, Column 2	\$ -
Cafeteria Fund balance Increase/(Decrease), Page 4f, Column 2	\$ -
Other Fund balance Increase/(Decrease), Page 4g, Column 2	\$ -
Other Fund balance Increase/(Decrease), Page 4h, Column 2	\$ -
Total all fund balances Increase/(Decrease) as a result of the settlement(s)	\$ (68,204)

Variance \$ -

**Variance Explanation:**

N/A

**6. Will this agreement create or increase deficit financing in the current or subsequent years?**

"Deficit Financing" is defined to exist when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If a deficit is shown below, provide an explanation and any deficit reduction plan, as necessary.

General Fund Combined	Surplus/ (Deficit)	(Deficit) %	Deficit primarily due to:
Current FY Surplus/(Deficit) before settlement(s)?	\$ (1,921,929)	(1.1%)	PY CY and decline in student enrollment
Current FY Surplus/(Deficit) after settlement(s)?	\$ (1,921,929)	(1.1%)	PY CY and decline in student enrollment
1st Subsequent FY Surplus/(Deficit) after settlement(s)?	\$ 675,720	0.5%	PY CY and decline in student enrollment
2nd Subsequent FY Surplus/(Deficit) after settlement(s)?	\$ (2,464,718)	(1.8%)	PY CY and decline in student enrollment

**Deficit Reduction Plan (as necessary):**

Deficit spending will be absorbed by the prior year carryover, the beginning fund balance.

**7. Were "Other Adjustments" amount(s) entered in the multiyear projections (pages 5a and 5b) for 1st and 2nd Subsequent FY?**

"Other Adjustments" could indicate that a budget reduction plan was/is being developed to address deficit spending, and to rebuild reserves. Any amount shown below must have an explanation. If additional space is needed, attach a separate sheet, or use page 9a.

MYP	Amount	"Other Adjustments" Explanation
1st Subsequent FY Unrestricted, Page 5a	\$ -	
1st Subsequent FY Restricted, Page 5b	\$ -	
2nd Subsequent FY Unrestricted, Page 5a	\$ -	
2nd Subsequent FY Restricted, Page 5b	\$ -	

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**J. COMPARISON OF PROPOSED CHANGE IN TOTAL COMPENSATION TO CHANGE IN LCFF FUNDING FOR THE NEGOTIATED PERIOD**

The purpose of this form is to determine if the district has entered into bargaining agreements that would result in salary increases that are expected to exceed the projected increase in LCFF funding.

(fill out columns for which there is an agreement)

	Prior Year	2023-24	2024-25	2025-26
a. LCFF Funding per ADA	14,323.00	11,259.00	11,805.00	12,722.00
b. Amount Change from Prior Year Funding per ADA		(3,064.00)	546.00	917.00
c. Percentage Change from Prior Year Funding per ADA		-21.39%	4.85%	7.77%
d. Total Compensation Amount Change (from Page 1, Section A, Line 5)		68,203.59	-	-
e. Total Compensation Percentage Change (from Page 1, Section A, Line 5)		5.50%	0.00%	0.00%
f. Proposed agreement is within/exceeds change in LCFF Funding (f vs. e)		Exceeds	-	-



## K. CERTIFICATION NO. 1: CERTIFICATION OF THE DISTRICT'S ABILITY TO MEET THE COSTS OF THE COLLECTIVE BARGAINING AGREEMENT

This certification page must be signed by the district's Superintendent and Chief Business Official at the time of public disclosure and is intended to assist the district's Governing Board in determining whether the district can meet the costs incurred under the tentative Collective Bargaining Agreement in the current and subsequent years. The absence of a certification signature or if "I am unable to certify" is checked should serve as a "red flag" to the district's Governing Board.

In accordance with the requirements of Government Code Sections 3540.2 and 3547.5, the Superintendent and Chief Business Official of the Azusa Unified School District, hereby certify that the District can meet the costs incurred under this Collective Bargaining Agreement during the term of the agreement from July 1, 2023 to June 30, 2024.

### Board Actions

The board actions necessary to meet the cost of the agreement in each year of its term are as follows:

#### Current Year

##### Budget Adjustment Categories:

Revenues/Other Financing Sources  
Expenditures/Other Financing Uses  
Ending Balance(s) Increase/(Decrease)

##### Budget Adjustment Increase/(Decrease)

\$	-
\$	68,204
\$	(68,204)

#### Subsequent Years

##### Budget Adjustment Categories:

Revenues/Other Financing Sources  
Expenditures/Other Financing Uses  
Ending Balance(s) Increase/(Decrease)

##### Budget Adjustment Increase/(Decrease)

\$	-
\$	-
\$	-

### Budget Revisions

If the district does not adopt and submit within 45 days all of the revisions to its budget needed in the current year to meet the costs of the agreement at the time of the approval of the proposed collective bargaining agreement, the county superintendent of schools is required to issue a qualified or negative certification for the district on its next interim report.

### Assumptions

See attached page for a list of the assumptions upon which this certification is based.

### Certifications

☒ I hereby certify ☐ I am unable to certify

Arturo Ortega  
Arturo Ortega (Dec 4, 2023 14:57 PST)

**District Superintendent**  
(Signature)

12/4/2023

**Date**

☒ I hereby certify ☐ I am unable to certify

Washa D. Jamal

**Chief Business Official**  
(Signature)

12/4/2023

**Date**

**Special Note:** The Los Angeles County Office of Education may request additional information, as necessary, to review the district's compliance with requirements.

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**Assumptions and Explanations** (enter or attach documentation)

The assumptions upon which this certification is made are as follows:

Assumptions based on 2023-2024 Adopted Budget Report.

Concerns regarding affordability of agreement in subsequent years (if any):

None.

**L. CERTIFICATION NO. 2**

The disclosure document must be signed by the district Superintendent at the time of public disclosure and by the President or Clerk of the Governing Board at the time of formal board action on the proposed agreement.

The information provided in this document summarizes the financial implications of the proposed agreement and is submitted to the Governing Board for public disclosure of the major provisions of the agreement (as provided in the "Public Disclosure of Proposed Collective Bargaining Agreement") in accordance with the requirements of AB 1200 and Government Code Sections 3540.2(a) and 3547.5.

Azusa Unified School District

**District Name**

Arturo Ortega

Arturo Ortega (Dec 4, 2023 14:57 PST)

**District Superintendent**  
**(Signature)**

12/4/2023

**Date**

Latasha D. Jamal

**Contact Person**

626-858-6162

**Phone**

After public disclosure of the major provisions contained in this summary, the Board of Education at its meeting on December 12, 2023, took action to approve the proposed agreement with the AEA Bargaining Unit(s).

**President (or Clerk), Governing Board**  
**(Signature)**

12/12/2023

**Date**

**Special Note:** The Los Angeles County Office of Education may request additional information, as necessary, to review the district's compliance with requirements.